



Engineering Construction Industry Training Board

Qualification Information Booklet

Level 3 Diploma in Management

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Introduction

This booklet has been developed to provide anyone considering the ECITB Level 3 Diploma in Monitoring Engineering Construction Activities with an introduction to the award currently available through ECITB. This booklet contains a copy of the QCF units within the Monitoring Engineering Construction Activities qualification as well as a summary of the way in which QCF qualifications are constructed; what the process is in achieving the ECITB qualification; and how it is assessed.

Should you have any queries, or require any further information regarding the awards offered by ECITB please contact the Awards and Qualifications Administrator at:

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1. What is an ECITB QCF qualification?

ECITB Qualification Credit Framework qualifications (QCF) are vocational qualifications which are based on the National Occupational Standards (NOS) of that particular sector of industry. NOS are developed by employers and professional bodies in conjunction with the Standard Setting Body and describe what is meant by occupational competence within a particular job role.

All QCF qualifications are structured in such a way that they can be broken down into the following common parts:

- Units;
- Level;
- Credit value;
- Learner outcomes;
- Assessment criteria;
- Assessment requirements.

Each of these parts is further described below.

Units	A qualification is divided into units, each of which describes an activity which the candidate will be expected to perform competently.
Level	The level represents the complexity, autonomy and/or range of achievement expressed within the unit.
Credit value	The credit value represents the learning time being defined as the time taken by learners at the level of the unit, on average, to complete the learning outcomes of the unit to the standard determined by the assessment criteria.
Learner outcomes	Learner outcomes set out what a candidate is expected to know, understand or be able to do as the result of a process of learning.
Assessment Criteria	The assessment criteria within a unit specifies the standard a candidate is expected to meet to demonstrate that the learning outcomes have been achieved.
Assessment requirements	Details any requirements about the way a unit must be assessed.

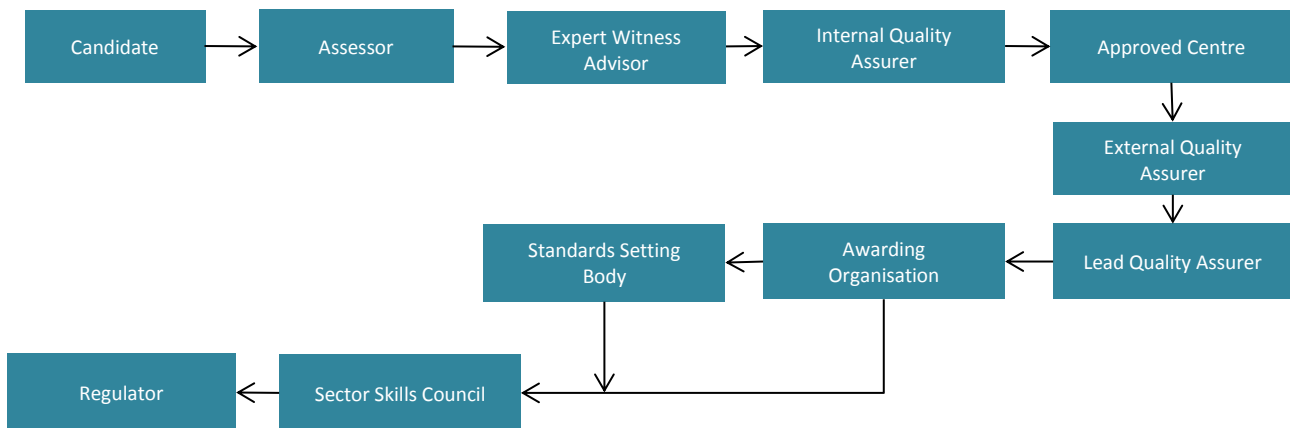
1.1 What is the process involved in achieving a QCF qualification?

Once a candidate has been registered with the awarding organisation, in this case ECITB Awards and Qualifications, they will be ready to begin working towards their qualification. They will then be introduced to the assessor who will offer support and guidance as the candidate progresses through the stages of the qualification. The assessor will firstly introduce the candidate to the other key members of the qualification system. These will include:

- Internal Quality Assurer
- Expert Witness Advisor
- Approved Centre
- Centre Co-ordinator
- External Quality Assurer
- Lead Quality Assurer
- Awarding Organisation
- Standard Setting Body
- Regulator (Office of Qualifications and Examinations Regulation (Ofqual)).

The Assessor will also explain what roles each of these key members will play in assuring the quality of the qualifications system. This is vitally important as it helps to ensure that the assessment of qualifications is valid and reliable and that certificates are only awarded to those candidates who do successfully meet the standards required.

The diagram below illustrates the flow of information between each of the key members.



The following tables summarise the roles which each of the key members perform in quality assuring the regulated qualifications systems, including N/SVQs.

Who's who	What is their role?
<p>Candidates Individuals seeking validation for their achievements and competence.</p>	<ul style="list-style-type: none"> • Show they can perform to the national standards in order to be awarded credit, counting towards a Qualification and demonstrate the specified knowledge, understanding and skills. • Take some responsibility for the quality of evidence provided to assessors.
<p>Assessors Nominated by an approved centre and approved by an awarding organisation to assess a candidate's evidence. In direct contact with candidates. Holds appropriate qualifications as agreed by the regulators such as D32 and D33 or A1.</p>	<ul style="list-style-type: none"> • Judge candidates' evidence against the national standards. • Advise candidates on opportunities to collect evidence. • Ensure that the evidence provided is current. (Up to and including the two year period prior to the portfolio completion date for any unit or qualification) • Decide whether the candidate has demonstrated competence, give feedback on the decision and record it. • Ensure that their assessment practice meets awarding organisation guidance and national standards.
<p>Expert Witness Advisor Nominated by an approved centre and approved by an awarding organisation to carry out direct observation as the exception when an assessor is not available.</p>	<ul style="list-style-type: none"> • Can carry out direct observation of the candidate against the criteria for the mandatory assessor observation of assessment criteria and assessment requirements where the practicalities and costs of having an assessor available to observe the candidate at work prohibitive or impracticable. • The EWA shall meet the criteria for assessor occupational expertise as specified by the ECITB Standards Setting Body Assessment Strategy. • A registered EWA can provide mandatory direct observation of any candidate in the relevant qualification for any approved centre as long as the assessor/EWA procedures are followed.
<p>Internal Quality Assurers Nominated by an approved centre and approved by an awarding organisation to ensure consistency and quality of assessment. Holds V1 and A1 or appropriate qualifications as agreed by the regulators. Works to the ECITB IQA Code of Practice</p>	<ul style="list-style-type: none"> • Work with assessors to ensure the quality and consistency of assessment. • Sample candidate assessments to ensure consistent assessment. • Ensure their own internal quality assurance meets current standards. • Ensure that assessment and verification records and documents are fit for purpose and meet awarding organisation requirements. • Ensure that requests for certificates to the awarding organisation are based on assessments of consistent quality. • Provide support and guidance for the centre's assessors.
<p>Approved Centre Co-ordinators Point of contact for awarding bodies. May take on some Internal Quality Assurer functions, particularly relating to administration.</p>	<ul style="list-style-type: none"> • Act as a contact for the awarding organisation and the External Quality Assurer. • Ensure that there are accurate assessment and verification records for the qualification. • Request certificates and credits from the awarding organisation.

<p>Approved Centres Organisations approved by awarding bodies to assess and verify qualifications.</p>	<ul style="list-style-type: none"> • Comply with regulatory requirements. • Manage assessment and verification on a day-to-day basis. • Have effective assessment practices and internal verification procedures. • Meet awarding organisation requirements for qualification delivery. • Have sufficient competent Assessors and Internal Quality Assurers with enough time and authority to carry out their roles effectively.
<p>Lead Quality Assurer Appointed by the ECITB awarding organisation to manage teams of External Quality Assurers (EQA)</p>	<ul style="list-style-type: none"> • Manage the workload and monitor performance of the External Quality Assurers. • Provide advice and guidance to External Quality Assurers. • Carry out all new centre approvals. • Approve post approval monitoring reports and ensure all actions are implemented. • Approve any recommendations for sanctions on centres. • Resolve disputes. • Approve recommendations for appointment of new assessors and Internal Quality Assurers.
<p>External Quality Assurers Appointed by the ECITB awarding organisation to monitor the work of approved centres. Act as key link between the awarding organisation and approved centres. Hold V2 and A1 or appropriate qualification as agreed with the regulators. Work to the ECITB Code of Practice.</p>	<ul style="list-style-type: none"> • Make sure that decisions on competence are consistent across centres. • Make sure that the quality of assessment and verification meets national standards. • Sample candidate assessments and monitor assessment and verification practices in centres, including interviews with assessors and Internal Quality Assurers and candidates. • Provide advice, guidance and feedback to centres. • Make regular visits to centres and assessment locations. • Ensure that their own verification practice meets V2 and A1 or appropriate qualification as agreed with the regulators.
<p>Awarding Organisations An organisation approved by the regulators to award qualifications.</p>	<ul style="list-style-type: none"> • Ensure the quality and consistency of assessment for qualifications nationally. • Produce guidance for centres. • Appoint, support and develop External Quality Assurers, allocate them to centres and monitor their work. • Approve and monitor centres against the approved centre criteria. • Award credit. • Collect information from centres to inform national decisions about qualification delivery. • Provide information to the regulators.
<p>Standards Setting Bodies (SSB) Develop the national occupational standards on which qualifications are based.</p>	<ul style="list-style-type: none"> • Work with industry to develop National Occupational Standards. • Work with awarding bodies to produce assessment strategies. • Provide information about, and clarification of, the National Occupational Standards.
<p>Sector Skills Councils (SSC)</p>	<ul style="list-style-type: none"> • Accredite qualifications put forward by awarding organisations if they meet the published criteria.

Ofqual

Ofqual is the regulator of qualifications, test and examinations in England, Wales and Northern Ireland.

- Ensure that organisations that offer and deliver qualifications (awarding organisations) have good systems in place, and that they are held to account for their performance.
- Ensure that all qualifications offered by awarding organisations are fair and are comparable with other qualifications.
- Ensure that standards in qualifications, exams and tests are monitored and the findings are reported.
- Ensure that there is fair access to qualifications for all candidates.
- Ensure the quality of marking of exams, tests and other assessments is high, so that learners get the results they deserve.
- Ensure that the qualifications market provides value for money and meets the needs of learners and employers.
- Ensure that debate about important topics, such as standards of exams and qualifications, is encouraged.

1.2 What will be assessed?

Once the candidate has decided with the assessor which route they will take through the qualification, i.e. the units they will work towards, they are ready to begin assessment. Broadly speaking two aspects of the candidate's working practice will be assessed: their performance; and their knowledge and understanding. The assessor will work with the candidate to plan how, when and where evidence will be gathered to cover these aspects.

1.3 How will assessment take place?

There are a variety of methods through which evidence of the candidate's competence and understanding can be gathered. There are also different methods by which to collect performance and knowledge evidence.;

- Direct observation of the candidate's performance by the assessor and/or EWA.
- Testimony from a witness such as a candidate's colleague, this is also observation of the candidate.
- Documentary evidence (*such as permits to work, work specifications etc.*) which relate to work successfully completed by the candidate on a past occasion.
- Demonstration of a task by the candidate at the assessor's request. This is known as 'Simulation'.
- Questioning of the candidate to establish knowledge and understanding requirements.

These options give an assessor and the candidate some flexibility in how they are able to prove competence. However, some of these assessment methods are less reliable and as such their use may be limited within the qualification. If this is the case the guidance contained within the QCF units will provide further clarification. Direct observation of the candidate by the assessor is the most reliable, and often the most straightforward, method of gathering evidence. The approved centre and the assessment team responsible for assessing the candidate will determine whether observation or some of the other assessment methods listed above offer the best assessment solution for each individual candidate.

In relation to evidence of knowledge and understanding there are two main assessment methods:

1. Performance evidence gathered in the course of working towards the unit.
2. Questioning of the candidate.

In some instances, it will be self-evident from the candidate's performance that they have acquired the necessary knowledge and understanding e.g. where the unit requires knowledge of how to carry out a specific task and by carrying it out effectively the candidate demonstrates that they know what to do.

However, knowledge of why something is done in a certain way cannot be demonstrated through performance alone and questioning of the candidate is another assessment method that could be used.

1.4 Simulation requirements

Demonstration, as previously outlined, is one of the assessment methods available to candidates and assessors through which to observe a candidate's competence. However, its use has been limited to certain specific units in which it may be possible to gather the naturally occurring workplace evidence normally required.

Reference needs to be made to the standards to confirm the status of each unit, however, as a rule simulation is only permissible where one or more of the following characteristics apply:

- a) Health and safety could be compromised by seeking workplace evidence.
- b) The behaviour or situation under which assessment occurs happens infrequently in the workplace.
- c) The responsibility for the work rests with the candidate, but it is typically either delegated or carried out jointly with another and the candidate has limited opportunity to demonstrate it directly and individually.
- d) There would be unacceptable commercial or operational risk in securing workplace assessment.
- e) Facilities would need to be placed in an unacceptable operating state to allow for assessment to take place.

The assessment requirements detail within each unit whether or not simulation is permitted within the assessment for that unit.

Where simulation is permitted, the simulated activity must be designed to reflect the activity as it would be carried out in a typical workplace environment, including:

- a) The presence, actions and capabilities of other interacting personnel.
- b) The urgency with which the activity must be carried out and the time needed to complete it.
- c) The number and sequence of actions needed to complete the activity.
- d) The number and complexity of the factors affecting the activity.
- e) The skills and knowledge needed to carry out the activity.
- f) The nature and availability of resources needed to carry out the activity.
- g) Access to references and sources of advice and assistance that could be needed if problems arise.
- h) The type of documentation to be completed.
- i) The standards to which the activity must be carried out, including any practices and procedures which must be followed.
- j) The outcomes which the activity will produce.
- k) Access to normal/usual workplace instructions.

1.5 Assessment of candidates with particular assessment requirements

Equal Opportunities, Reasonable Adjustments and Special Considerations.

Access to Fair Assessment

ECITB Awards & Qualifications requires approved centres to demonstrate a clear commitment to access to fair assessment, equal opportunities, reasonable adjustments and special considerations and to operate a Fair Assessment Policy in all matters concerning the assessment of candidates for the award of Qualifications and/or certificates or unit credits and in any appeals against approved centre decisions.

The policy must take account of full current legislation in the area of access to fair assessment and equal opportunities.

The approved centre must ensure that relevant staff in the assessment team receives training in the relevant sections of current legislation and that sufficient and appropriate information with regard to the content of this procedure is passed to all members of the approved centre assessment team.

The approved centre must maintain records of assessment and verification decisions, which demonstrate that:

- Assessment decisions only discriminate between candidates on the basis of the competence defined by the National Occupational Standards specified in the qualification.
- Assessment judgements are made regardless of race, gender, disability, nationality, religion, age, sexual orientation, family status or any other irrelevant factor.

Arrangements for candidates with particular assessment requirements

Principles

Approved centres must ensure that there are no unnecessary barriers to assessment, which prevent candidates from effectively demonstrating their attainment. Arrangements for candidates with particular assessment requirements (special arrangements) must also ensure that such candidates are not given, or do not appear to be given, an unfair advantage. Special arrangements are generally not appropriate where the candidate's particular difficulty directly affects performance in the actual attributes that are the focus of assessment.

Approved centres must make special arrangements according to the needs of the individual candidate, reflecting the candidate's usual method of working, the assessment requirements as set out in the specification and any guidelines set down by the regulatory authorities. Any special arrangements must ensure that the validity, reliability and integrity of the assessment are preserved and that certificates accurately reflect candidate attainment.

Approved centres are only required to do what is 'reasonable' in terms of giving access. What is reasonable will depend on the individual circumstances, cost implications and the practicality and effectiveness of the adjustment. As stated above the NOS must be taken into consideration, as must any safety and health implications.

There are two ways in which access to fair assessment can be maintained

1. Through reasonable adjustments.
2. Through special consideration.

Reasonable Adjustments

A reasonable adjustment is any action that helps to reduce the effect of a disability that places the candidate at a substantial disadvantage in the assessment situation.

Reasonable adjustments must not affect the integrity of what needs to be assessed, but may involve:

- Changing standard assessment arrangements, for example allowing candidates extra time to complete the assessment activity.
- Adapting assessment materials, such as providing materials in Braille.
- Providing access facilitators during assessment, such as a sign language interpreter or a reader.
- Re-organising the assessment room, such as removing visual stimuli for an autistic candidate.

Reasonable adjustments will not be taken into consideration during the assessment of the candidates work.

Special Consideration

Special consideration is given following an assessment to candidates who are present for the assessment but may have been disadvantaged by temporary illness, injury or adverse circumstances, which arose at or near the time of assessment.

Special consideration should not give the candidate an unfair advantage neither should its use cause the user of the certificate to be misled regarding a candidate's achievements. The candidate's result must reflect his or her achievement in the assessment and not necessarily his or her potential ability.

Where an assessment requires a competence, criteria or standard to be met fully, it may not be possible to apply special consideration. In some circumstances it may be more appropriate to offer the candidate an opportunity to retake the assessment at a later date or to extend the registration period so that the candidate has more time to complete the assessment activity.

Approved centres must make provision for special consideration to ensure that candidates who suffer temporary illness, injury or indisposition at the time of assessment are treated fairly. Such assessment should be made available to the candidate as soon as is reasonably practical within the guidelines of access to fair assessment. Where this is not possible, the awarding organisation will consider each individual case for special consideration, identifying the minimum requirements for an award to be made.

Procedures

Approved centre assessment team members should refer to the written procedures provided within the ECITB Awards & Qualifications Quality Assurance Procedures Manual for further guidance and information or to their own Approved Centre Operations Manual.

Monitoring and Reporting

The awarding organisation will monitor, evaluate and report annually on the use of special arrangements by its approved centres. Relevant data will be shared with the regulatory authorities on request.

1.6 Recommended prior learning

There is no prior knowledge, attainment or experience required for this qualification. Existing workers are expected to be competent by virtue of their length of service and experience and satisfactory performance in their roles, and will need to achieve the qualification in order to have this competence validated.

1.7 Credit

Credit is awarded to candidates for the successful achievement of the learning outcomes of a unit. The number of credits awarded will be the same as the value of the achieved unit. It is not possible for some credit to be achieved for partial completion of a unit or for candidates be awarded credit when all learning outcomes are not achieved by virtue of any 'compensation' for stronger performance in other areas of learning/achievement.

Credit accumulation is the term used to describe the process of putting a combination of credits to meet the achievement requirements of a qualification. The rules of combination for a qualification determine the requirements for achievement of credits through particular units. Awarding Organisations award qualifications based on this process.

Credit transfer describes the process of using a credit or credits awarded in the context of a different qualification or awarded by a different awarding organisation towards the achievement requirements of another qualification. Credits can only be transferred between qualifications and awarding organisations subject to the rules of combination for the receiving qualification.

1.8 Rules of Combination

Rules of combination specify the credits that need to be achieved through completion of particular units for a qualification to be awarded. All accredited qualifications within the QCF must have a set of rules of combination. Rules of combination set out the credit value of the qualification, credits from mandatory units and credits from optional units, credits from equivalent units and exemptions along with time limits on the process of credit accumulation or exemptions.

Exemptions are detailed within the rules of combination, exemptions set out any exemption from the requirement to achieve credit for units that candidates can claim, based on certificated achievement outside the QCF deemed to be of equivalent value to a QCF unit or units.

Time limits on the process of credit accumulation or exemptions are set out for each QCF unit within the rules of combination. ECITB QCF units have a time limit of 24 months from achievement for use within a QCF qualification.

1.9 Career development within the engineering construction industry

The ECITB's Apprenticeship programme is its main vehicle for recruiting and training young people to meet the future skills requirements of the industry. Qualifications at Levels 2 and 3 are often an integral part of this scheme.

The ECITB provides an alternative training route towards qualifications for those who have not completed an apprenticeship but seek to have their competence validated. Information on this scheme is available on request from ECITB offices.

For more information about career progression you can go to the ECITB website.

2. Qualification Structure

To achieve this qualification, candidates must attain a minimum of 55 credits made up of:

- all FIVE of the Mandatory Units (31 credits) plus
- a minimum of 17 credits from Group B Optional Units (A maximum of 7 credits can come from Optional Group C).

MANDATORY UNITS – candidates must achieve all FIVE units to a total of 31 credits

Ofqual Ref. Number	CFA Ref. Number	Unit Title	Level	Credit
T/506/2952	M&L 9	Manage personal and professional development	3	3
A/506/1821	M&L 11	Manage team performance	3	4
F/506/2596	M&L 15	Principles of leadership and management	3	8
R/506/1937	M&L 24	Principles of people management	3	6
D/506/1942	B&A 59	Principles of business	3	10

GROUP B OPTIONAL UNITS – candidates must achieve a minimum of 17 credits from this group.

Ofqual Ref. Number	CFA Ref. Number	Unit Title	Level	Credit
T/506/1820	M&L 10	Promote equality, diversity and inclusion in the workplace	3	3
J/506/1921	M&L 12	Manage individuals' performance	3	4
L/506/1922	M&L 13	Manage individuals' development in the workplace	3	3
Y/506/1924	M&L 14	Chair and lead meetings	3	3
J/506/2292	M&L 16	Encourage innovation	3	4
K/506/1927	M&L 17	Manage conflict within a team	3	5
M/506/1928	M&L 18	Procure products and/or services	3	5
T/506/1929	M&L 19	Implement change	3	5
K/506/1930	M&L 20	Implement and maintain business continuity plans and processes	3	4
M/506/1931	M&L 21	Collaborate with other departments	3	3
A/506/1933	M&L 22	Support remote or virtual teams	3	4
F/506/1934	M&L 23	Participate in a project	3	3
J/506/1949	M&L 25	Develop and maintain professional networks	4	3
Y/506/1955	M&L 27	Develop and implement an operational plan	4	5
M/506/1962	M&L 28	Encourage learning and development	4	3
A/506/1981	M&L 31	Discipline and grievance management	4	3
F/506/1982	M&L 32	Develop working relationships with stakeholders	4	4
K/506/1989	M&L 34	Manage physical resources	4	4
J/506/2907	M&L 35	Manage the impact of work activities on the environment	4	4
K/506/1992	M&L 36	Prepare for and support quality audits	4	3
T/506/1994	M&L 37	Conduct quality audits	4	3
A/506/1995	M&L 38	Manage a budget	4	4
R/506/1999	M&L 40	Manage a project	4	7

L/506/2004	M&L 41	Manage business risk	4	6
A/506/2032	M&L 42	Manage knowledge in an organisation	4	5
R/506/2909	M&L 43	Recruitment, selection and induction practice	4	6
M/506/2044	M&L 44	Manage redundancy and redeployment	4	6

GROUP C OPTIONAL UNITS – a maximum of 7 credits can come from this group.

Ofqual Ref. Number	CFA Ref. Number	Unit Title	Level	Credit
M/506/1895	B&A 35	Buddy a colleague to develop their skills	2	3
D/506/1911	B&A 41	Contribute to the improvement of business performance	3	6
H/506/1912	B&A 42	Negotiate in a business environment	3	4
K/506/1913	B&A 43	Develop a presentation	3	3
M/506/1914	B&A 44	Deliver a presentation	3	3
A/506/1916	B&A 46	Contribute to the development and implementation of an information system	3	6
K/506/2169	CS 30	Resolve customers' problems	3	4
R/506/2151	CS 31	Resolve customers' complaints	3	4
D/506/2170	CS 32	Gather, analyse and interpret customer feedback	3	5
L/506/1905	B&A 39	Employee rights and responsibilities	2	2
T/505/4673	HSPW2	Health and Safety Procedures in the Workplace	2	2
M/506/1959	B&A 69	Manage events	4	6
F/506/2176	CS 36	Review the quality of customer service	4	4

3. Level 3 Diploma in Management

Title	Manage personal and professional development	
Skills CFA Reference	M&L 9	
Level	3	
Credit Value	3	
GLH	12	
Unit Reference No.	T/506/2952	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Be able to identify personal and professional development requirements	1.1 Compare sources of information on professional development trends and their validity 1.2 Identify trends and developments that influence the need for professional development 1.3 Evaluate their own current and future personal and professional development needs relating to the role, the team and the organisation	
2. Be able to fulfil a personal and professional development plan	2.1 Evaluate the benefits of personal and professional development 2.2 Explain the basis on which types of development actions are selected 2.3 Identify current and future likely skills, knowledge and experience needs using skills gap analysis 2.4 Agree a personal and professional development plan that is consistent with business needs and personal objectives 2.5 Execute the plan within the agreed budget and timescale 2.6 Take advantage of development opportunities made available by professional networks or professional bodies	
3. Be able to maintain the relevance of a personal and professional development plan	3.1 Explain how to set specific, measurable, achievable, realistic and time-bound (SMART) objectives 3.2 Obtain feedback on performance from a range of valid sources 3.3 Review progress toward personal and professional objectives 3.4 Amend the personal and professional development plan in the light of feedback received from others	

Additional Information about the unit	
Unit expiry date	31 August 2017
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	<p>Management & Leadership (2012) National Occupational Standards:</p> <ul style="list-style-type: none"> • CFAM&LAA1 Manage yourself • CFAM&LAA2 Develop your knowledge, skills and competence • CFAM&LAA3 Develop and maintain your professional networks"
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.3
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared

Title	Manage team performance	
Skills CFA Reference	M&L 11	
Level	3	
Credit Value	4	
GLH	21	
Unit Reference No.	A/506/1821	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand the management of team performance	1.1 Explain the use of benchmarks in managing performance 1.2 Explain a range of quality management techniques to manage team performance 1.3 Describe constraints on the ability to amend priorities and plans	
2. Be able to allocate and assure the quality of work	2.1 Identify the strengths, competences and expertise of team members 2.2 Allocate work on the basis of the strengths, competences and expertise of team members 2.3 Identify areas for improvement in team members' performance outputs and standards 2.4 Amend priorities and plans to take account of changing circumstances 2.5 Recommend changes to systems and processes to improve the quality of work	
3. Be able to manage communications within a team	3.1 Explain to team members the lines of communication and authority levels 3.2 Communicate individual and team objectives, responsibilities and priorities 3.3 Use communication methods that are appropriate to the topics, audience and timescales 3.4 Provide support to team members when they need it 3.5 Agree with team members a process for providing feedback on work progress and any issues arising 3.6 Review the effectiveness of team communications and make improvements	

Additional Information about the unit	
Unit expiry date	31 August 2017
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> • CFAM&LDB2 Allocate work to team members • CFAM&LDB3 Quality assure work in your team
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.3
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared

Title	Principles of leadership and management	
Skills CFA Reference	M&L 15	
Level	3	
Credit Value	8	
GLH	50	
Unit Reference No.	F/506/2596	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand the principles of effective decision making	1.1 Explain the importance of defining the objectives, scope and success criteria of the decisions to be taken 1.2 Assess the importance of analysing the potential impact of decision making 1.3 Explain the importance of obtaining sufficient valid information to enable effective decision making 1.4 Explain the importance of aligning decisions with business objectives, values and policies 1.5 Explain how to validate information used in the decision making process 1.6 Explain how to address issues that hamper the achievement of targets and quality standards	
2. Understand leadership styles and models	2.1 Explain the difference in the influence of managers and leaders on their teams 2.2 Evaluate the suitability and impact of different leadership styles in different contexts 2.3 Analyse theories and models of motivation and their application in the workplace	
3. Understand the role, functions and processes of management	3.1 Analyse a manager's responsibilities for planning, coordinating and controlling work 3.2 Explain how managers ensure that team objectives are met 3.3 Explain how a manager's role contributes to the achievement of an organisation's vision, mission and objectives 3.4 Analyse theories and models of management 3.5 Explain how the application of management theories guide a manager's actions 3.6 Explain the operational constraints imposed by budgets	
4. Understand performance measurement	4.1 Explain the relationship between business objectives and performance measures 4.2 Explain the features of a performance measurement system 4.3 Explain how to set key performance indicators (KPIs) 4.4 Explain the tools, processes and timetable for monitoring and reporting on business performance 4.5 Explain the use of management accounts and management information systems in performance management 4.6 Explain the distinction between outcomes and outputs	

Additional Information about the unit	
Unit expiry date	31 August 2017
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> • CFAM&LBA2 Provide leadership in your area of responsibility • CFAM&LDB4 Manage people's performance at work
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	N/A
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.3
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared

Title	Principles of people management	
Skills CFA Reference	M&L 24	
Level	3	
Credit Value	6	
GLH	34	
Unit Reference No.	R/506/1937	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand the principles of workforce management	1.1 Explain the relationship between Human Resources (HR) functions and other business functions 1.2 Explain the purpose and process of workforce planning 1.3 Explain how employment law affects an organisation's HR and business policies and practices 1.4 Evaluate the implications for an organisation of utilising different types of employment contracts 1.5 Evaluate the implications for an individual of different types of employment contracts	
2. Understand equality of opportunity, diversity and inclusion	2.1 Explain an organisation's responsibilities and liabilities under equality legislation 2.2 Explain the benefits that effective equality of opportunity, diversity and inclusion policies bring to individuals and organisations 2.3 Explain the language and behaviour that support commitments to equality of opportunity, diversity and inclusion 2.4 Explain how to measure diversity within an organisation	
3. Understand team building and dynamics	3.1 Explain the difference between a group and a team 3.2 Outline the characteristics of an effective team 3.3 Explain the techniques of building a team 3.4 Explain techniques to motivate team members 3.5 Explain the importance of communicating targets and objectives to a team 3.6 Examine theories of team development 3.7 Explain common causes of conflict within a team 3.8 Explain techniques to manage conflict within a team	
4. Understand performance management	4.1 Identify the characteristics of an effective performance management system 4.2 Explain the uses of specific, measurable, achievable, realistic and time-bound (SMART) objectives and priorities 4.3 Describe best practice in conducting appraisals 4.4 Explain the factors to be taken into account when managing people's wellbeing and performance 4.5 Explain the importance of following disciplinary and grievance processes	
5. Understand training and development	5.1 Explain the benefits of employee development 5.2 Explain the advantages and limitations of different types of training and development methods 5.3 Explain the role of targets, objectives and feedback in employee development 5.4 Explain how personal development plans support the training and development of individuals 5.5 Explain how to make use of planned and unplanned learning opportunities to meet individuals' preferred learning styles 5.6 Explain how to support individuals' learning and development	

6. Understand reward and recognition	6.1 Describe the components of 'total reward' 6.2 Analyse the relationship between motivation and reward 6.3 Explain different types of pay structures 6.4 Explain the risks involved in the management of reward schemes
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Additional Information about the unit	
Unit expiry date	31 August 2017
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> • CFAM&LBA7 Promote equality of opportunity, diversity and inclusion • CFAM&LDB1 Build teams • CFAM&LDB4 Manage people's performance at work • CFAM&LDB8 Manage conflict in teams • CFAM&LDC2 Support individuals' learning and development • CFAM&LDC5 Help individuals address problems affecting their performance
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	N/A
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.3
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared

Title	Principles of business	
Skills CFA Reference	B&A 59	
Level	3	
Credit Value	10	
GLH	74	
Unit Reference No.	D/506/1942	
Learning Outcomes		Assessment Criteria
The learner will:		The learner can:
1. Understand business markets	1.1 Explain the characteristics of different business markets 1.2 Explain the nature of interactions between businesses within a market 1.3 Explain how an organisation's goals may be shaped by the market in which it operates 1.4 Describe the legal obligations of a business	
2. Understand business innovation and growth	2.1 Define business innovation 2.2 Explain the uses of models of business innovation 2.3 Identify sources of support and guidance for business innovation 2.4 Explain the process of product or service development 2.5 Explain the benefits, risks and implications associated with innovation	
3. Understand financial management	3.1 Explain the importance of financial viability for an organisation 3.2 Explain the consequences of poor financial management 3.3 Explain different financial terminology	
4. Understand business budgeting	4.1 Explain the uses of a budget 4.2 Explain how to manage a budget	
5. Understand sales and marketing	5.1 Explain the principles of marketing 5.2 Explain a sales process 5.3 Explain the features and uses of market research 5.4 Explain the value of a brand to an organisation 5.5 Explain the relationship between sales and marketing	

Additional Information about the unit	
Unit expiry date	31 August 2017
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> CFABAA112 Contribute to innovation in a business environment
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	N/A
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.2
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared

Title	Promote equality, diversity and inclusion in the workplace	
Skills CFA Reference	M&L 10	
Level	3	
Credit Value	3	
GLH	15	
Unit Reference No.	T/506/1820	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand the organisational aspects of equality, diversity and inclusion in the workplace	1.1 Explain the difference between equality, diversity and inclusion 1.2 Explain the impact of equality, diversity and inclusion across aspects of organisational policy 1.3 Explain the potential consequences of breaches of equality legislation 1.4 Describe nominated responsibilities within an organisation for equality, diversity and inclusion	
2. Understand the personal aspects of equality, diversity and inclusion in the workplace	2.1 Explain the different forms of discrimination and harassment 2.2 Describe the characteristics of behaviour that supports equality, diversity and inclusion in the workplace 2.3 Explain the importance of displaying behaviour that supports equality, diversity and inclusion in the workplace	
3. Be able to support equality, diversity and inclusion in the workplace	3.1 Ensure colleagues are aware of their responsibilities for equality, diversity and inclusion in the workplace 3.2 Identify potential issues relating to equality, diversity and inclusion in the workplace 3.3 Adhere to organisational policies and procedures, and legal and ethical requirements when supporting equality, diversity and inclusion in the workplace	

Additional Information about the unit	
Unit expiry date	31 August 2017
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> CFAM&LBA7 Promote equality of opportunity, diversity and inclusion
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.3
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared

Title	Manage individuals' performance	
Skills CFA Reference	M&L 12	
Level	3	
Credit Value	4	
GLH	20	
Unit Reference No.	J/506/1921	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand the management of underperformance in the workplace	1.1 Explain typical organisational policies and procedures on discipline, grievance and dealing with underperformance 1.2 Explain how to identify causes of underperformance 1.3 Explain the purpose of making individuals aware of their underperformance clearly but sensitively 1.4 Explain how to address issues that hamper individuals' performance 1.5 Explain how to agree a course of action to address underperformance	
2. Be able to manage individuals' performance in the workplace	2.1 Agree with team members specific, measurable, achievable, realistic and time-bound (SMART) objectives that align to organisational objectives 2.2 Delegate responsibility to individuals on the basis of their expertise, competence, skills, knowledge, and development needs 2.3 Apply motivation techniques to maintain morale 2.4 Provide information, resources and on-going mentoring to help individuals meet their targets, objectives and quality standards 2.5 Monitor individuals' progress towards objectives in accordance with agreed plans 2.6 Recognise individuals' achievement of targets and quality standards 2.7 Adhere to organisational policies and procedures, and legal and ethical requirements when managing individuals' performance in the workplace	

Additional Information about the unit	
Unit expiry date	31 August 2017
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> • CFAM&LDB4 Manage people's performance at work • CFAM&LDC2 Support individuals' learning and development • CFAM&LDC3 Mentor individuals • CFAM&LDC5 Help individuals address problems affecting their performance
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.3
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared

Title	Manage individuals' development in the workplace	
Skills CFA Reference	M&L 13	
Level	3	
Credit Value	3	
GLH	10	
Unit Reference No.	L/506/1922	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Be able to carry out performance appraisals	1.1 Explain the purpose of performance reviews and appraisals 1.2 Explain techniques to prepare for and carry out appraisals 1.3 Provide a private environment in which to carry out appraisals 1.4 Carry out performance reviews and appraisals in accordance with organisational policies and procedures 1.5 Provide clear, specific and evidence-based feedback sensitively 1.6 Agree future actions that are consistent with appraisal findings and identified development needs	
2. Be able to support the learning and development of individual team members	2.1 Describe training techniques that can be applied in the workplace 2.2 Analyse the advantages and disadvantages of learning and development interventions and methods 2.3 Explain organisational learning and development policies and resource availability 2.4 Review individuals' learning and development needs at regular intervals 2.5 Suggest learning and development opportunities and interventions that are likely to meet individual and business needs	

Additional Information about the unit	
Unit expiry date	31 August 2017
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> • CFAM&LDC1 Identify individuals' learning needs and styles • CFAM&LDC2 Support individuals' learning and development
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.3
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared

Title	Chair and lead meetings	
Skills CFA Reference	M&L 14	
Level	3	
Credit Value	3	
GLH	10	
Unit Reference No.	Y/506/1924	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Be able to prepare to lead meetings	1.1 Identify the type, purpose, objectives, and background to a meeting 1.2 Identify those individuals expected, and those required to attend a meeting 1.3 Prepare for any formal procedures that apply to a meeting 1.4 Describe ways of minimising likely problems in a meeting 1.5 Take action to ensure that meeting documentation is prepared correctly and distributed to the agreed people within the agreed timescale	
2. Be able to chair and lead meetings	2.1 Follow business conventions in the conduct of a meeting 2.2 Facilitate meetings so that everyone is involved and the optimum possible consensus is achieved 2.3 Manage the agenda within the timescale of the meeting 2.4 Summarise the agreed actions, allocated responsibilities, timescales and any future arrangements	
3. Be able to deal with post-meeting matters	3.1 Take action to ensure that accurate records of a meeting are produced and distributed in the agreed format and timescale 3.2 Take action to ensure that post-meeting actions are completed 3.3 Evaluate the effectiveness of a meeting and identify points for future improvement	

Additional Information about the unit	
Unit expiry date	31 August 2017
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> CFAM&LDD6 Lead meetings to achieve objectives
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.3
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared

Title	Encourage innovation	
Skills CFA Reference	M&L 16	
Level	3	
Credit Value	4	
GLH	14	
Unit Reference No.	J/506/2292	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Be able to identify opportunities for innovation	1.1 Analyse the advantages and disadvantages of techniques used to generate ideas 1.2 Explain how innovation benefits an organisation 1.3 Explain the constraints on their own ability to make changes 1.4 Agree with stakeholders terms of reference and criteria for evaluating potential innovation and improvement 1.5 Engage team members in finding opportunities to innovate and suggest improvements 1.6 Monitor performance, products and/or services and developments in areas that may benefit from innovation 1.7 Analyse valid information to identify opportunities for innovation and improvement	
2. Be able to generate and test ideas for innovation and improvement	2.1 Generate ideas for innovation or improvement that meet the agreed criteria 2.2 Test selected ideas that meet viability criteria 2.3 Evaluate the fitness for purpose and value of the selected ideas 2.4 Assess potential innovations and improvements against the agreed evaluation criteria	
3. Be able to implement innovative ideas and improvements	3.1 Explain the risks of implementing innovative ideas and improvements 3.2 Justify conclusions of efficiency and value with evidence 3.3 Prepare costings and schedules of work that will enable efficient implementation 3.4 Design processes that support efficient implementation	

Additional Information about the unit	
Unit expiry date	31 August 2017
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> CFAM&LCA1 Identify and evaluate opportunities for innovation and improvement
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.3
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared

Title	Manage conflict within a team	
Skills CFA Reference	M&L 17	
Level	3	
Credit Value	5	
GLH	25	
Unit Reference No.	K/506/1927	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand the principles of conflict management	1.1 Evaluate the suitability of different methods of conflict management in different situations 1.2 Describe the personal skills needed to deal with conflict between other people 1.3 Analyse the potential consequences of unresolved conflict within a team 1.4 Explain the role of external arbitration and conciliation in conflict resolution	
2. Be able to reduce the potential for conflict within a team	2.1 Communicate to team members their roles, responsibilities, objectives and expected standards of behaviour 2.2 Explain to team members the constraints under which other colleagues work 2.3 Review systems, processes, situations and structures that are likely to give rise to conflict in line with organisational procedures 2.4 Take action to minimise the potential for conflict within the limits of their own authority 2.5 Explain how team members' personalities and cultural backgrounds may give rise to conflict	
3. Be able to deal with conflict within a team	3.1 Assess the seriousness of conflict and its potential impact 3.2 Treat everyone involved with impartiality and sensitivity 3.3 Decide a course of action that offers optimum benefits 3.4 Explain the importance of engaging team members' support for the agreed actions 3.5 Communicate the actions to be taken to those who may be affected by it 3.6 Adhere to organisational policies and procedures, legal and ethical requirements when dealing with conflict within a team	

Additional Information about the unit	
Unit expiry date	31 August 2017
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> • CFAM&LDB8 Manage conflict in teams • CFAM&LDD5 Manage conflict in the broader work environment
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.3
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared

Title	Procure products and/or services	
Skills CFA Reference	M&L 18	
Level	3	
Credit Value	5	
GLH	35	
Unit Reference No.	M/506/1928	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Be able to identify procurement requirements	1.1 Explain current and likely future procurement requirements 1.2 Decide whether the purchase of products and/or services offers the organisation best value 1.3 Evaluate ethical and sustainability considerations relating to procurement 1.4 Justify the decision to buy products and/or services with evidence of an analysis of risk, costs and benefits	
2. Be able to select suppliers	2.1 Explain the factors to be taken into account in selecting suppliers 2.2 Explain organisational procurement policies, procedures and standards 2.3 Explain the effect of supplier choice on the supply chain 2.4 Use appropriate media to publicise procurement requirements 2.5 Confirm the capability and track record of suppliers and their products and/or services 2.6 Select suppliers that meet the procurement specification	
3. Be able to buy products and/or services	3.1 Explain the action to be taken in the event of problems arising 3.2 Agree contract terms that are mutually acceptable within their own scope of authority 3.3 Record agreements made, stating the specification, contract terms and any post-contract requirements 3.4 Adhere to organisational policies and procedures, legal and ethical requirements	

Additional Information about the unit	
Unit expiry date	31 August 2017
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> • CFAM&LED1 Decide whether to produce or buy in products and/or services • CFAM&LED2 Procure products and/or services • CFAM&LED3 Select suppliers through a tendering process
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.3
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared

Title	Implement change	
Skills CFA Reference	M&L 19	
Level	3	
Credit Value	5	
GLH	28	
Unit Reference No.	T/506/1929	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand the principles of change management	1.1 Explain the importance of effective leadership when implementing change 1.2 Explain the role of internal and external stakeholders in the management of change 1.3 Evaluate the suitability of change management models for different contexts 1.4 Explain how to assess the business risks associated with change 1.5 Assess the need for contingency planning when implementing change 1.6 Assess the need for crisis management when implementing change 1.7 Explain the different types of barriers to change and how to deal with these 1.8 Explain how to evaluate change management projects	
2. Be able to plan the implementation of change	2.1 Explain the need for change 2.2 Explain the potential consequences of not implementing change 2.3 Explain the roles and responsibilities of a change management project team 2.4 Develop a plan that includes specific, measurable, achievable, realistic and time-bound (SMART) objectives and resources 2.5 Brief team members on their roles and responsibilities and the objectives of the change 2.6 Gain acceptance to the need for change from team members and other stakeholders	
3. Be able to manage the implementation of a change plan	3.1 Explain organisational escalation processes for reporting problems 3.2 Analyse the advantages and disadvantages of monitoring techniques 3.3 Implement the plan within the agreed timescale 3.4 Provide support to team members and other stakeholders according to identified needs 3.5 Monitor the progress of the implementation against the plan 3.6 Manage problems in accordance with contingency plans	
4. Be able to evaluate the effectiveness of the implementation of change plans	4.1 Assess the suitability of techniques used to analyse the effectiveness of change 4.2 Collate valid feedback and information from stakeholders 4.3 Analyse feedback and information against agreed criteria 4.4 Identify areas for future improvement 4.5 Communicate the lessons learned with those who may benefit	

Additional Information about the unit	
Unit expiry date	31 August 2017
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> • CFAM&LCA2 Plan change • CFAM&LCA3 Engage people in change • CFAM&LCA4 Implement change • CFAM&LCA5 Evaluate change
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.3
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared

Title	Implement and maintain business continuity plans and processes	
Skills CFA Reference	M&L 20	
Level	3	
Credit Value	4	
GLH	25	
Unit Reference No.	K/506/1930	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Be able to plan for the implementation of business continuity plans and processes	1.1 Describe the components of a business continuity plan 1.2 Explain the uses of a business continuity plan 1.3 Explain the features of different business continuity planning models 1.4 Explain the potential consequences of inadequate business continuity plans and processes 1.5 Confirm the required aim, scope and objectives of business continuity plans 1.6 Engage stakeholders in developing business continuity plans and processes 1.7 Identify business-critical products and/or services and the activities and resources that support them	
2. Be able to implement business continuity plans and processes	2.1 Develop a framework for business continuity management 2.2 Recommend resources that are proportionate to the potential impact of business disruption 2.3 Communicate the importance and requirements of business continuity plans and processes to stakeholders 2.4 Meet their own objectives within the plan	
3. Be able to maintain the fitness for purpose of on-going business continuity plans and processes	3.1 Provide training for staff who may be affected 3.2 Validate and test the strength of business continuity plans and processes 3.3 Update plans and processes in the light of feedback from business continuity exercises and other sources of information	

Additional Information about the unit	
Unit expiry date	31 August 2017
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> CFAM&LBB2 Develop, maintain and evaluate business continuity plans and arrangements
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.3
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared

Title	Collaborate with other departments	
Skills CFA Reference	M&L 21	
Level	3	
Credit Value	3	
GLH	14	
Unit Reference No.	M/506/1931	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand how to collaborate with other departments	1.1 Explain the need for collaborating with other departments 1.2 Explain the nature of the interaction between their own team and other departments 1.3 Explain the features of effective collaboration 1.4 Explain the potential implications of ineffective collaboration with other departments 1.5 Explain the factors relating to knowledge management that should be considered when collaborating with other departments	
2. Be able to identify opportunities for collaboration with other departments	2.1 Analyse the advantages and disadvantages of collaborating with other departments 2.2 Identify with which departments collaborative relationships should be built 2.3 Identify the scope for and limitations of possible collaboration	
3. Be able to collaborate with other departments	3.1 Agree Service Level Agreements (SLAs), objectives and priorities of collaborative arrangements 3.2 Work with other departments in a way that contributes to the achievement of organisational objectives	

Additional Information about the unit	
Unit expiry date	31 August 2017
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> CFAM&LDD3 Develop and sustain collaborative relationships with other departments
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.3
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared

Title	Support remote or virtual teams	
Skills CFA Reference	M&L 22	
Level	3	
Credit Value	4	
GLH	18	
Unit Reference No.	A/506/1933	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Be able to assess the support needed by remote or virtual teams	1.1 Identify the resource requirements for providing communication tools and processes for remote or virtual working 1.2 Specify effective tools and processes that are capable of supporting remote or virtual teams 1.3 Identify processes and systems that will enable people to connect to information and knowledge remotely and securely 1.4 Plan how to assure the safety of staff in remote teams	
2. Be able to support remote or virtual teams	2.1 Provide guidelines, training, information and coaching to support remote or virtual teams 2.2 Identify areas for improvement from monitoring processes and information 2.3 Facilitate interactive collaboration amongst stakeholders 2.4 Take action to ensure that team members adhere to regulatory, professional and commercial requirements 2.5 Take action to ensure that data security and confidentiality issues arising from remote or virtual working are addressed 2.6 Take action to ensure that records management issues arising from remote or virtual working are addressed	

Additional Information about the unit	
Unit expiry date	31 August 2017
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> CFAM&LDB6 Support remote/virtual teams
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.3
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared

Title	Participate in a project	
Skills CFA Reference	M&L 23	
Level	3	
Credit Value	3	
GLH	19	
Unit Reference No.	F/506/1934	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand how to manage a project	1.1 Explain the features of a project business case 1.2 Explain the stages of a project lifecycle 1.3 Explain the roles of people involved in a project 1.4 Explain the uses of project-related information 1.5 Explain the advantages and limitations of different project monitoring techniques 1.6 Analyse the interrelationship of project scope, schedule, finance, risk, quality and resources	
2. Be able to support the delivery of a project	2.1 Fulfil their role in accordance with a project plan 2.2 Collect project-related information in accordance with project plans 2.3 Use appropriate tools to analyse project information 2.4 Report on information analysis in the agreed format and timescale 2.5 Draw issues, anomalies and potential problems to the attention of project managers 2.6 Adhere to organisational policies and procedures, legal and ethical requirements in supporting the delivery of a project	

Additional Information about the unit	
Unit expiry date	31 August 2017
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> • CFAM&LFA5 Manage projects
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.3
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared

Title	Develop and maintain professional networks	
Skills CFA Reference	M&L 25	
Level	4	
Credit Value	3	
GLH	15	
Unit Reference No.	J/506/1949	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand the principles of effective networking	1.1 Describe the interpersonal skills needed for effective networking 1.2 Explain the basis on which to choose networks to be developed 1.3 Evaluate the role of shared agendas and conflict management in relationship-building 1.4 Evaluate the role of the internet in business networking 1.5 Assess the importance of following up leads and actions 1.6 Analyse ethical issues relating to networking activities	
2. Be able to identify professional networks for development	2.1 Identify potential networks for professional development from an analysis of their benefits compared with individual needs and aspirations 2.2 Shortlist networks for development against defined criteria 2.3 Assess the benefits and limitations of joining and maintaining selected network(s)	
3. Be able to maintain professional networks	3.1 Identify the potential for mutual benefit with network members 3.2 Promote their own skills, knowledge and competence to network members 3.3 Provide information, services or support to network members where the potential for mutual benefit has been identified 3.4 Establish the boundaries of confidentiality 3.5 Agree guidelines for the exchange of information and resources 3.6 Take action to ensure that participation in networks reflects current and defined future aspirations and needs 3.7 Make introductions to people with common or complementary interest to and within networks	

Additional Information about the unit	
Unit expiry date	31 August 2017
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> CFAM&LAA3 Develop and maintain your professional networks
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.3
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared

Title	Develop and implement an operational plan	
Skills CFA Reference	M&L 27	
Level	4	
Credit Value	5	
GLH	24	
Unit Reference No.	Y/506/1955	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand the principles of operational planning	1.1 Evaluate the use of risk analysis techniques in operational planning 1.2 Explain the components of an operational plan 1.3 Analyse the relationship between strategic and operational plans 1.4 Evaluate the use of planning tools and techniques in the operational planning process 1.5 Explain how to carry out a cost-benefit analysis	
2. Be able to develop an operational plan	2.1 Identify specific, measurable, achievable, realistic and time-bound (SMART) objectives and key performance indicators (KPIs) 2.2 Identify evaluation mechanisms appropriate to the plan 2.3 Take action to ensure that plans are consistent with organisational strategy, objectives, values, policies and procedures 2.4 Develop proportionate and targeted plans to manage identified risks 2.5 Take action to ensure that plans complement and maximise synergy with other business areas 2.6 Adhere to organisational policies and procedures, legal and ethical requirements	
3. Be able to implement an operational plan	3.1 Implement plans within agreed budgets and timescales 3.2 Communicate the requirements of the plans to those who will be affected 3.3 Revise plans in the light of changing circumstances in accordance with strategic objectives and identified risks	
4. Be able to evaluate the effectiveness of an operational plan	4.1 Conduct periodic reviews of the progress and effectiveness of the plans, using information from a range of sources 4.2 Report on the effectiveness of operational plans in the appropriate format	

Additional Information about the unit	
Unit expiry date	31 August 2017
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> CFAM&LBA9 Develop operational plans
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.3
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared

Title	Encourage learning and development	
Skills CFA Reference	M&L 28	
Level	4	
Credit Value	3	
GLH	16	
Unit Reference No.	M/506/1962	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand the principles of learning and development	1.1 Assess the role of continuous professional development (CPD) in identifying and meeting individuals' learning and development for current and future business needs 1.2 Analyse the advantages and limitations of different learning and development methods 1.3 Explain how to identify individuals' learning and development needs 1.4 Evaluate the role of self-reflection in learning and development	
2. Be able to support individuals' learning and development	2.1 Promote the benefits of learning to people in own area of responsibility 2.2 Support individuals in identifying their current and likely future learning and development needs from a range of information sources 2.3 Agree with individuals the learning activities to be undertaken, ensuring they are within agreed budgets and consistent with business needs 2.4 Summarise agreed learning objectives, learning activities, review mechanisms and success criteria in a personal development plan 2.5 Create an environment that encourages and promotes learning and development 2.6 Provide opportunities for individuals to apply their developing competence in the workplace	
3. Be able to evaluate individuals' learning and development	3.1 Analyse information from a range of sources on individuals' performance and development 3.2 Evaluate the effectiveness of different learning and development methods 3.3 Agree revisions to personal development plans in the light of feedback	

Additional Information about the unit	
Unit expiry date	31 August 2017
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> • CFAM&LDC1 Identify individuals' learning needs and styles • CFAM&LDC2 Support individuals' learning and development
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.3
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared

Title	Discipline and grievance management	
Skills CFA Reference	M&L 31	
Level	4	
Credit Value	3	
GLH	26	
Unit Reference No.	A/506/1981	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand the principles supporting the management of discipline and grievance cases	1.1 Explain the difference between a discipline case and a grievance case and the implications for their management 1.2 Explain sources of advice and expertise on discipline and grievance 1.3 Explain the legal obligations of employers and the rights of employees in relation to discipline and grievance cases 1.4 Explain organisational procedures for the management of discipline and grievance cases 1.5 Explain the communication techniques to be used in the management of discipline and grievance cases 1.6 Explain the types of behaviours that are likely to result in disciplinary proceedings 1.7 Explain the types of actions that are likely to lead to a grievance 1.8 Explain how to carry out investigations into discipline and grievance cases 1.9 Analyse the effect of well managed and poorly managed discipline and grievance cases 1.10 Explain how the outcomes of discipline and grievance cases can be managed	
2. Be able to manage a disciplinary case	2.1 Inform an individual that they are subject to disciplinary proceedings within agreed timescales 2.2 Explain to an individual the reasons why they are subject to disciplinary proceedings 2.3 Provide evidence that supports the case for disciplinary proceedings 2.4 Develop a case to support an individual who is subject to disciplinary proceedings 2.5 Keep detailed and accurate records of agreements, actions and events for disciplinary cases 2.6 Adhere to organisational policies and procedures, legal and ethical requirements when managing a disciplinary case	
3. Be able to manage a grievance	3.1 Identify the nature of a grievance 3.2 Investigate the seriousness and potential implications of a grievance 3.3 Adhere to organisational procedures when managing a grievance 3.4 Evaluate the effectiveness of how a grievance has been managed 3.5 Agree measures to prevent future reoccurrences of grievances	

Additional Information about the unit	
Unit expiry date	31 August 2017
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Management & Leadership (2012) National Occupational Standards : <ul style="list-style-type: none"> • CFAM&LDA7 Initiate and follow grievance procedures
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.3
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared

Title	Develop working relationships with stakeholders	
Skills CFA Reference	M&L 32	
Level	4	
Credit Value	4	
GLH	20	
Unit Reference No.	F/506/1982	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand working relationships with stakeholders	1.1 Analyse stakeholder mapping techniques 1.2 Explain how influencing skills and techniques can be used to enhance the relationship with stakeholders 1.3 Explain how expectation management and conflict resolution techniques are applied to stakeholder management 1.4 Analyse the advantages and limitations of different types of stakeholder consultation 1.5 Evaluate the risks and potential consequences of inadequate stakeholder consultation	
2. Be able to determine the scope for collaboration with stakeholders	2.1 Identify the stakeholders with whom relationships should be developed 2.2 Explain the roles, responsibilities, interests and concerns of stakeholders 2.3 Evaluate business areas that would benefit from collaboration with stakeholders 2.4 Evaluate the scope for and limitations of collaborating with different types of stakeholder	
3. Be able to develop productive working relationships with stakeholders	3.1 Create a climate of mutual trust and respect by behaving openly and honestly 3.2 Take account of the advice provided by stakeholders 3.3 Minimise the potential for friction and conflict amongst stakeholders	
4. Be able to evaluate relationships with stakeholders	4.1 Monitor relationships and developments with stakeholders 4.2 Address changes that may have an effect on stakeholder relationships 4.3 Recommend improvements based on analyses of the effectiveness of stakeholder relationships	

Additional Information about the unit	
Unit expiry date	31 August 2017
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> CFAM&LDD2 Develop and sustain productive working relationships with stakeholders
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.3
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared

Title	Manage physical resources	
Skills CFA Reference	M&L 34	
Level	4	
Credit Value	4	
GLH	26	
Unit Reference No.	K/506/1989	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Be able to identify the need for physical resources	1.1 Identify resource requirements from analyses of organisational needs 1.2 Evaluate alternative options for obtaining physical resources 1.3 Evaluate the impact on the organisation of introducing physical resources 1.4 Identify the optimum option that meets operational requirements for physical resources	
2. Be able to obtain physical resources	2.1 Develop a business case for physical resources that is supported by evidence, cost estimates, contingency arrangements and an analysis of likely benefits 2.2 Obtain authorisation and financial commitment for the required expenditure 2.3 Negotiate best value from contracts in accordance with organisational standards and procedures 2.4 Adhere to organisational policies and procedures, legal and ethical requirements when obtaining physical resources 2.5 Check that the physical resources received match those ordered	
3. Be able to manage the use of physical resources	3.1 Take action to ensure physical resources are used in accordance with manufacturers' instructions 3.2 Evaluate the efficiency of physical resources against agreed criteria 3.3 Recommend improvements to the use of physical resources and associated working practices 3.4 Analyse the benefits of effective equipment in the conservation of energy and the environment	

Additional Information about the unit	
Unit expiry date	31 August 2017
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> • CFAM&LEB2 Obtain physical resources • CFAM&LEB3 Manage physical resources
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.3
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared

Title	Manage the impact of work activities on the environment	
Skills CFA Reference	M&L 35	
Level	4	
Credit Value	4	
GLH	30	
Unit Reference No.	J/506/2907	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand how to support environmentally-friendly working practices	1.1 Explain how to carry out an environmental impact analysis 1.2 Compare sources of specialist advice on environmentally-friendly working practices 1.3 Analyse the business and environmental benefits of effective energy management policies 1.4 Explain the health and safety requirements for the use and disposal of resources and waste	
2. Be able to organise work so as to minimise the impact on the environment	2.1 Analyse potentially adverse effects on the environment caused by work activities 2.2 Evaluate the effectiveness of methods of improving environmental sustainability in an organisation 2.3 Implement plans and procedures to adapt work practices to make them more environmentally-friendly 2.4 Develop a system for colleagues to recommend improvements to make work practices more environmentally-friendly	
3. Be able to manage the environmental impact of the use of resources	3.1 Explain when to obtain specialist environmental management advice 3.2 Explain where to seek specialist environmental management advice 3.3 Determine the environmental impact of the use of different physical resources 3.4 Develop procedures for the disposal of waste and unwanted resources in a way that minimises the impact on the environment 3.5 Evaluate the effectiveness of organisational environmental policies and procedures 3.6 Adhere to organisational policies and procedures, legal and ethical requirements	

Additional Information about the unit	
Unit expiry date	31 August 2017
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> CFAM&LEB4 Manage the environmental and social impacts of your work
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.3
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared

Title	Prepare for and support quality audits	
Skills CFA Reference	M&L 36	
Level	4	
Credit Value	3	
GLH	17	
Unit Reference No.	K/506/1992	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand the principles underpinning the management of quality	1.1 Analyse the principles of quality management 1.2 Analyse the purpose and requirements of a range of quality standards 1.3 Analyse the advantages and limitations of a range of quality techniques 1.4 Assess how the management of quality contributes to the achievement of organisational objectives	
2. Be able to prepare for quality audits	2.1 Establish the quality requirements applicable to the work being audited 2.2 Confirm that documentation is complete 2.3 Confirm that any previously agreed actions have been implemented 2.4 Make available information requested in advance by auditors	
3. Be able to support quality audits	3.1 Provide access to information on request within scope of the audit 3.2 Agree actions and timescales with auditors that will remedy non-conformance or non-compliance 3.3 Identify instances where business processes, quality standards and/or procedures could be improved 3.4 Develop a quality improvement plan that addresses the issues raised	

Additional Information about the unit	
Unit expiry date	31 August 2017
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> CFAM&LFE3 Prepare for and participate in quality audits
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.3
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared

Title	Conduct quality audits	
Skills CFA Reference	M&L 37	
Level	4	
Credit Value	3	
GLH	21	
Unit Reference No.	T/506/1994	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand the principles underpinning the management of quality	1.1 Analyse the principles of quality management 1.2 Analyse the purpose and requirements of a range of quality standards 1.3 Analyse the advantages and limitations of a range of quality techniques 1.4 Assess how the management of quality contributes to the achievement of organisational objectives	
2. Be able to prepare to carry out quality audits	2.1 Establish the quality requirements applicable to the work being audited 2.2 Develop a plan for a quality audit 2.3 Prepare the documentation needed to undertake a quality audit 2.4 Specify data requirements to those who will support the audit	
3. Be able to conduct quality audits	3.1 Confirm that any previously agreed actions have been implemented 3.2 Analyse information against agreed quality criteria 3.3 Identify instances where business processes, quality standards and/or procedures could be improved 3.4 Agree actions and timescales that will remedy non-conformance or non-compliance	

Additional Information about the unit	
Unit expiry date	31 August 2017
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> • CFAM&LFE4 Carry out quality audits
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.3
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared

Title	Manage a budget	
Skills CFA Reference	M&L 38	
Level	4	
Credit Value	4	
GLH	26	
Unit Reference No.	A/506/1995	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand how to identify financial requirements	1.1 Explain how to calculate the estimated costs of activities, resources and overheads needed to achieve objectives 1.2 Analyse the components of a business case to meet organisational requirements 1.3 Analyse the factors to be taken into account to secure the support of stakeholders 1.4 Describe the business planning and budget-setting cycle	
2. Understand how to set budgets	2.1 Explain the purposes of budget-setting 2.2 Analyse the information needed to enable realistic budgets to be set 2.3 Explain how to address contingencies 2.4 Explain organisational policies and procedures on budget-setting	
3. Be able to manage a budget	3.1 Use the budget to control performance and expenditure 3.2 Identify the cause of variations from budget 3.3 Explain the actions to be taken to address variations from budget 3.4 Propose realistic revisions to budget, supporting recommendations with evidence 3.5 Provide budget-related reports and information within agreed timescales 3.6 Explain the actions to be taken in the event of suspected instances of fraud or malpractice	
4. Be able to evaluate the use of a budget	4.1 Identify successes and areas for improvement in budget management 4.2 Make recommendations to improve future budget setting and management	

Additional Information about the unit	
Unit expiry date	31 August 2017
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> • CFAM&LEA1 Identify and justify requirements for financial resources • CFAM&LEA4 Manage budgets
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.3
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared

Title	Manage a project	
Skills CFA Reference	M&L 40	
Level	4	
Credit Value	7	
GLH	38	
Unit Reference No.	R/506/1999	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand the management of a project	1.1	Explain how to carry out a cost-benefit analysis for a project
	1.2	Evaluate the use of risk analysis techniques
	1.3	Evaluate project planning and management tools and techniques
	1.4	Evaluate the impact of changes to project scope, schedule, finance, risk, quality and resources
	1.5	Analyse the requirements of project governance arrangements
2. Be able to plan a project	2.1	Analyse how a project fits with an organisation's overall vision, objectives, plans and programmes of work
	2.2	Agree the objectives and scope of proposed projects with stakeholders
	2.3	Assess the interdependencies and potential risks within a project
	2.4	Develop a project plan with specific, measurable, achievable, realistic and time-bound (SMART) objectives, key performance indicators (KPIs) and evaluations mechanisms appropriate to the plan
	2.5	Develop proportionate and targeted plans to manage identified risks and contingencies
	2.6	Apply project lifecycle approaches to the progress of a project
3. Be able to manage a project	3.1	Allocate resources in accordance with the project plan
	3.2	Brief project team members on their roles and responsibilities
	3.3	Implement plans within agreed budgets and timescales
	3.4	Communicate the requirements of the plans to those who will be affected
	3.5	Revise plans in the light of changing circumstances in accordance with project objectives and identified risks
	3.6	Keep stakeholders up to date with developments and problems
	3.7	Complete close-out actions in accordance with project plans
	3.8	Adhere to organisational policies and procedures, legal and ethical requirements when managing a project
4. Be able to evaluate the effectiveness of a project	4.1	Conduct periodic reviews of the progress and effectiveness of a project using information from a range of sources
	4.2	Evaluate the effectiveness of capturing and managing project-related knowledge
	4.3	Report on the effectiveness of plans

Additional Information about the unit	
Unit expiry date	31 August 2017
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> • CFAM&LFA5 Manage projects
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.3
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared

Title	Manage business risk	
Skills CFA Reference	M&L 41	
Level	4	
Credit Value	6	
GLH	27	
Unit Reference No.	L/506/2004	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand the management of business risk	1.1 Explain what is meant by business risk 1.2 Analyse business risk identification theories and models 1.3 Explain measures and techniques to mitigate business risk 1.4 Explain their own level of authority in managing risk	
2. Be able to address business risk	2.1 Monitor work in line with organisational risk procedures 2.2 Identify potential risks using agreed risk criteria 2.3 Assess identified risks, their potential consequences and the probability of them happening 2.4 Communicate to stakeholders the likelihood of the risk occurring and its potential consequences 2.5 Explain organisational business risk management policies	
3. Be able to mitigate business risk	3.1 Develop risk management plans and processes that are proportionate to the risk and the available resources 3.2 Implement risk management plans in accordance with organisational requirements 3.3 Monitor on-going risk-related developments and amend plans in the light of changing circumstances 3.4 Keep stakeholders informed of any developments and their possible consequences 3.5 Evaluate the effectiveness of actions taken, identifying possible future improvements	

Additional Information about the unit	
Unit expiry date	31 August 2017
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> CFAM&LBB1 Manage risks to your organisation
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.3
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared

Title	Manage knowledge in an organisation	
Skills CFA Reference	M&L 42	
Level	4	
Credit Value	5	
GLH	34	
Unit Reference No.	A/506/2032	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand the principles of knowledge management	1.1 Explain the concept, scope and importance of knowledge management 1.2 Explain the concept of intellectual property 1.3 Identify the business drivers that lead to effective knowledge management 1.4 Explain the risks associated with knowledge management and their potential implications 1.5 Explain the importance of engaging others and communicating knowledge management issues and activities 1.6 Explain best practice principles and techniques for effective knowledge management 1.7 Describe strategies to manage tacit and explicit knowledge	
2. Be able to identify knowledge to be managed within an organisation	2.1 Identify the criteria against which knowledge will be managed 2.2 Engage colleagues in identifying the knowledge to be managed	
3. Be able to manage knowledge within an organisation	3.1 Implement actions in accordance with the knowledge management plan 3.2 Adhere to security processes for the collection, storage and retrieval of knowledge 3.3 Evaluate the extent to which current knowledge management systems and processes are fit for purpose 3.4 Recommend improvements to processes and systems to manage knowledge 3.5 Assess the likely impact and implications of the loss of knowledge	

Additional Information about the unit	
Unit expiry date	31 August 2017
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> • CFAM&LEC2 Manage information, knowledge and communication systems • CFAM&LEC3 Develop knowledge and make it available
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.3
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared

Title	Recruitment, selection and induction practice	
Skills CFA Reference	M&L 43	
Level	4	
Credit Value	6	
GLH	33	
Unit Reference No.	R/506/2909	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand the principles and theories underpinning recruitment, selection and induction practice	1.1 Explain workforce planning techniques 1.2 Describe the information needed to identify recruitment requirements 1.3 Assess the impact of an organisation's structure and culture on its recruitment and selection policies and practices 1.4 Analyse the factors involved in establishing recruitment and selection criteria 1.5 Evaluate the suitability of different recruitment and selection methods for different roles 1.6 Analyse patterns of employment that affect the recruitment of staff 1.7 Explain the factors to be taken into account when developing job specifications, personal specifications and job advertisements 1.8 Explain the induction process 1.9 Explain the relationship between human resource processes and the induction processes	
2. Be able to recruit people into an organisation	2.1 Determine current staffing needs 2.2 Identify current skills needs from identified staffing needs 2.3 Identify future workforce needs 2.4 Develop a resourcing plan that addresses identified needs within budgetary limitations 2.5 Evaluate the cost-effectiveness of different methods of recruitment for an identified role 2.6 Explain how recruitment policies and practices meet legal and ethical requirements 2.7 Select the most appropriate method of recruitment for identified roles	
3. Be able to select appropriate people for the role	3.1 Plan assessment processes that are valid and reliable 3.2 Provide those involved in the selection process with sufficient information to enable them to make informed decisions 3.3 Justify assessment decisions with evidence 3.4 Inform applicants of the outcome of the process in line with organisational procedures 3.5 Evaluate the effectiveness of the selection process 3.6 Adhere to organisational policies and procedures, legal and ethical requirements when carrying out selection assessments	
4. Be able to induct people into an organisation	4.1 Develop induction materials that meet operational and new starters' needs 4.2 Explain to new starters organisational policies, procedures and structures 4.3 Explain to new starters their role and responsibilities 4.4 Explain to new starters their entitlements and where to go for help 4.5 Assess new starters' training needs 4.6 Confirm that training is available that meets operational and new starters' needs	

	4.7 Provide support that meets new starters' needs throughout the induction period
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Additional Information about the unit	
Unit expiry date	31 August 2017
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> • CFAM&LDA1 Plan the workforce • CFAM&LDA2 Recruit, select and retain people • CFAM&LDA3 Induct individuals into their roles
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.3
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared

Title	Manage redundancy and redeployment	
Skills CFA Reference	M&L 44	
Level	4	
Credit Value	6	
GLH	39	
Unit Reference No.	M/506/2044	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand the management of redundancy	1.1 Explain the legal requirements that relate to the management of redundancy 1.2 Explain the conditions required for a redundancy and their implications 1.3 Explain possible ways of avoiding redundancies 1.4 Explain the factors involved in identifying the pool for redundancy selection 1.5 Explain the factors involved in developing an appeals process 1.6 Explain the process for planning and managing a redundancy 1.7 Evaluate the implications of voluntary and compulsory redundancy on individuals 1.8 Evaluate the implications of voluntary and compulsory redundancy for organisations 1.9 Evaluate the type of information required by staff who are retained 1.10 Evaluate the type of information required by staff who are made redundant 1.11 Assess the role of outplacement in redundancy	
2. Understand the principles of redeployment	2.1 Explain the concept of redeployment 2.2 Explain the legal requirements that relate to the management of redeployment 2.3 Explain the process for planning and managing a redeployment 2.4 Evaluate the type of information required by staff who are retained 2.5 Evaluate the type of information required by staff who are redeployed 2.6 Evaluate the benefits and limitations to an organisation of redeployment 2.7 Assess the role of project management techniques in the management of redeployment	
3. Be able to manage a redundancy	3.1 Evaluate the available options for avoiding a redundancy and their implications 3.2 Develop a redundancy plan and timetable that addresses redundancy objectives 3.3 Take action to ensure that redundancy payments are calculated accurately 3.4 Use an appropriate method for communicating the outcome of a redundancy decision 3.5 Make agreed support services available to those who have been made redundant	
4. Be able to manage the redeployment of staff	4.1 Explain to redeployees the reasons, purpose and benefits of redeployment 4.2 Develop a redeployment plan that addresses agreed objectives 4.3 Use an appropriate method for communicating about redeployment 4.4 Make agreed support services available to those being redeployed	

	4.5 Adhere to organisational policies and procedures, legal and ethical requirements for the redeployment of staff
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Additional Information about the unit	
Unit expiry date	31 August 2017
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Management & Leadership (2012) National Occupational Standards: <ul style="list-style-type: none"> • CFAM&LDA4 Manage the redeployment of people • CFAM&LDA5 Manage redundancies
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.3
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared

Title	Buddy a colleague to develop their skills	
Skills CFA Reference	B&A 35	
Level	2	
Credit Value	3	
GLH	19	
Unit Reference No.	M/506/1895	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand how to buddy a colleague	1.1 Describe what is expected of a buddy 1.2 Explain techniques to give positive feedback and constructive criticism 1.3 Explain techniques to establish rapport with a buddy	
2. Be able to plan to buddy a colleague	2.1 Agree which aspects of a colleague's work may benefit from buddying 2.2 Confirm organisational requirements for standards of behaviour, presentation, communication and performance of a buddy colleague 2.3 Agree a schedule of meetings that minimise disruption to business 2.4 Agree specific, measurable, achievable, realistic and time-bound (SMART) buddying objectives	
3. Be able to support a buddy colleague carrying out work activities	3.1 Remain unobtrusive while a buddy colleague carries out their work activities 3.2 Provide examples of how to carry out tasks correctly 3.3 Identify instances of good practice and areas for improvement through observation 3.4 Praise a buddy colleague on well completed tasks 3.5 Give constructive feedback on ways in which a buddy could improve performance 3.6 Offer a buddy hints and tips based on personal experience	

Additional Information about the unit	
Unit expiry date	31 August 2017
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Customer Service (2013) National Occupational Standards: <ul style="list-style-type: none"> CFACSD5249 Buddy a colleague to develop their customer service skills
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.2
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared

Title	Contribute to the improvement of business performance	
Skills CFA Reference	B&A 41	
Level	3	
Credit Value	6	
GLH	33	
Unit Reference No.	D/506/1911	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand the principles of resolving business problems	1.1 Explain the use of different problem-solving techniques 1.2 Explain the organisational and legal constraints relating to problem-solving 1.3 Describe the role of stakeholders in problem-solving 1.4 Describe the steps in the business decision-making process 1.5 Analyse the implications of adopting recommendations and implementing decisions to solve business problems	
2. Understand improvement techniques and processes	2.1 Describe the purpose and benefits of continuous improvement 2.2 Analyse the features, use and constraints of different continuous improvement techniques and models 2.3 Explain how to carry out a cost-benefit analysis 2.4 Explain the importance of feedback from customers and other stakeholders in continuous improvement	
3. Be able to solve problems in business	3.1 Identify the nature, likely cause and implications of a problem 3.2 Evaluate the scope and scale of a problem 3.3 Analyse the possible courses of action that can be taken in response to a problem 3.4 Use evidence to justify the approach to problem-solving 3.5 Develop a plan and success criteria that are appropriate to the nature and scale of a problem 3.6 Obtain approval to implement a solution to a problem 3.7 Take action to resolve or mitigate a problem 3.8 Evaluate the degree of success and scale of the implications of a solved problem	
4. Be able to contribute to the improvement of activities	4.1 Identify the nature, scope and scale of possible contributions to continuous improvement activities 4.2 Measure changes achieved against existing baseline data 4.3 Calculate performance measures relating to cost, quality and delivery 4.4 Justify the case for adopting improvements identified with evidence 4.5 Develop standard operating procedures and resource plans that are capable of implementing agreed changes	

Additional Information about the unit	
Unit expiry date	31 August 2017
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFABAH122 Assist in improving organisational performance
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.2
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared

Title	Negotiate in a business environment	
Skills CFA Reference	B&A 42	
Level	3	
Credit Value	4	
GLH	18	
Unit Reference No.	H/506/1912	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand the principles underpinning negotiation	1.1 Describe the requirements of a negotiation strategy 1.2 Explain the use of different negotiation techniques 1.3 Explain how research on the other party can be used in negotiations 1.4 Explain how cultural differences might affect negotiations	
2. Be able to prepare for business negotiations	2.1 Identify the purpose, scope and objectives of the negotiation 2.2 Explain the scope of their own authority for negotiating 2.3 Prepare a negotiating strategy 2.4 Prepare fall-back stances and compromises that align with the negotiating strategy and priorities 2.5 Assess the likely objectives and negotiation stances of the other party 2.6 Research the strengths and weaknesses of the other party	
3. Be able to carry out business negotiations	3.1 Carry out negotiations within responsibility limits in a way that optimises opportunities 3.2 Adapt the conduct of the negotiation in accordance with changing circumstances 3.3 Maintain accurate records of negotiations, outcomes and agreements made 3.4 Adhere to organisational policies and procedures, and legal and ethical requirements when carrying out business negotiations	

Additional Information about the unit	
Unit expiry date	31 August 2017
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> CFABAG124 Negotiate in a business environment
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.2
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared

Title	Develop a presentation	
Skills CFA Reference	B&A 43	
Level	3	
Credit Value	3	
GLH	11	
Unit Reference No.	K/506/1913	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand how to develop a presentation	1.1 Explain best practice in developing presentations 1.2 Explain who needs to be consulted on the development of a presentation 1.3 Explain the factors to be taken into account in developing a presentation 1.4 Analyse the advantages and limitations of different communication media	
2. Be able to develop a presentation	2.1 Identify the purpose, content, style, timing and audience for a presentation 2.2 Select a communication media that is appropriate to the nature of a presentation, message and audience 2.3 Tailor a presentation to fit the timescale and audience's needs 2.4 Prepare a presentation that is logically structured, summarises the content and addresses the brief 2.5 Take action to ensure that a presentation adheres to organisational guidelines and policies 2.6 Develop materials that support the content of a presentation	

Additional Information about the unit	
Unit expiry date	31 August 2017
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFABAA617 Develop a presentation
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.2
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared

Title	Deliver a presentation	
Skills CFA Reference	B&A 44	
Level	3	
Credit Value	3	
GLH	17	
Unit Reference No.	M/506/1914	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand the principles underpinning the delivery of presentations	1.1 Analyse the advantages and limitations of different methods of, and media for, making presentations 1.2 Explain how the type and size of the audience affects the delivery of a presentation 1.3 Explain the factors to be taken into account in developing contingency plans when delivering presentations 1.4 Explain voice projection and timing techniques when delivering presentations 1.5 Explain the factors to be taken into account in responding to questions from an audience 1.6 Explain different methods for evaluating the effectiveness of a presentation	
2. Be able to prepare to deliver a presentation	2.1 Confirm the layout of the venue and correct functioning of equipment and resources prior to making a presentation 2.2 Develop contingency plans for potential equipment and resource failure 2.3 Take action to ensure that the presentation fits the time slot available	
3. Be able to deliver a presentation	3.1 Speak clearly and confidently, using language that is appropriate for the topic and the audience 3.2 Vary their voice tone, pace and volume appropriately when delivering a presentation 3.3 Use body language in a way that reinforces messages 3.4 Use equipment and resources effectively when delivering a presentation 3.5 Deliver a presentation within the agreed timeframe 3.6 Respond to questions in a way that meets the audience's needs 3.7 Evaluate the effectiveness of a presentation	

Additional Information about the unit	
Unit expiry date	31 August 2017
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> CFABAA623 Deliver a presentation
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.2
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared

Title	Contribute to the development and implementation of an information system	
Skills CFA Reference	B&A 46	
Level	3	
Credit Value	6	
GLH	21	
Unit Reference No.	A/506/1916	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand the design and implementation of an information system	1.1 Explain the types of information to be managed by a system 1.2 Explain how information will be used and by whom 1.3 Explain who needs to be consulted in the design and implementation of an information system and why 1.4 Explain the impact of legal and organisational security and confidentiality requirements for the design and implementation of an information system	
2. Be able to contribute to the development of an information system	2.1 Confirm the purpose, use and features of an information system 2.2 Identify the information that will be managed by the system 2.3 Confirm requirements for reporting information 2.4 Recommend the functions that will be used to manipulate and report information 2.5 Develop guidance for the use of an information system that is accurate and easy to understand 2.6 Recommend user access and security levels for the information system 2.7 Make contributions to the development of an information system that are consistent with business objectives and values and within budgetary constraints 2.8 Participate in system tests in accordance with the specification	
3. Be able to contribute to the implementation of an information system	3.1 Implement the information system in accordance with the plan, minimising disruption to business 3.2 Confirm that staff are trained to use the system prior to its launch 3.3 Resolve or report problems or faults with the information system within the limits of their own authority 3.4 Adhere to organisational policies and procedures, and legal and ethical requirements in the implementation of an information system	

Additional Information about the unit	
Unit expiry date	31 August 2017
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> CFABAD111 Support the design and development of information system
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.2
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared

Title	Resolve customers' problems	
Skills CFA Reference	CS 30	
Level	3	
Credit Value	4	
GLH	19	
Unit Reference No.	K/506/2169	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand the monitoring and resolution of customers' problems	1.1 Assess the suitability of a range of techniques for monitoring customer problems 1.2 Explain how to use the resolution of customers' problems to improve products and/or services 1.3 Explain how the successful resolution of customers' problems contributes to customer loyalty and enhanced business performance 1.4 Explain the features of negotiating techniques used to resolve customers' problems	
2. Be able to deal with customers' problems	2.1 Confirm the nature and cause of customers' problems 2.2 Explain when customers' problems should be treated as complaints 2.3 Explain the benefits to customers and the organisation of the options available to solve problems 2.4 Explain the drawbacks to customers and the organisation of the options available to solve problems 2.5 Explain to customers the options for resolving their problems 2.6 Agree solutions that meet customers' and organisational requirements within their own levels of authority 2.7 Inform colleagues of the nature of problems and actions taken 2.8 Evaluate the effectiveness of the resolution of customers' problems 2.9 Adhere to organisational policies and procedures, legal and ethical requirements when dealing with customers' problems	

Additional Information about the unit	
Unit expiry date	31 August 2017
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Customers Service (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFACSC5 Monitor and solve customer service problems
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.2
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared

Title	Resolve customers' complaints	
Skills CFA Reference	CS 31	
Level	3	
Credit Value	4	
GLH	22	
Unit Reference No.	R/506/2151	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand the monitoring and resolution of customers' complaints	1.1 Assess the suitability of a range of monitoring techniques for customers' complaints 1.2 Explain how to identify those complaints that should prompt a review of the service offer and service delivery 1.3 Explain negotiating techniques used to resolve customers' complaints 1.4 Explain conflict management techniques used in dealing with upset customers 1.5 Explain organisational procedures for dealing with customer complaints 1.6 Explain when to escalate customers' complaints 1.7 Explain the cost and regulatory implications of admitting liability on the basis of a customer complaint 1.8 Explain the advantages and limitations of offering compensation or replacement products and/or services	
2. Be able to deal with customers' complaints	2.1 Confirm the nature, cause and implications of customers' complaints 2.2 Take personal responsibility for dealing with complaints 2.3 Communicate in a way that recognises customers' problems and understands their points of view 2.4 Explain the advantages and limitations of different complaint response options to customers 2.5 Explain the advantages and limitations of different complaint response options to the organisation 2.6 Keep customers informed of progress 2.7 Agree solutions with customers that address the complaint and which are within the limits of their own authority 2.8 Record the outcome of the handling of complaints for future reference 2.9 Adhere to organisational policies and procedures, legal and ethical requirements when dealing with customers' complaints	

Additional Information about the unit	
Unit expiry date	31 August 2014
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Customers Service (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFACSC7 Process customer service complaints • CFACSC8 Handle referred customer complaints
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.2
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared

Title	Gather, analyse and interpret customer feedback	
Skills CFA Reference	CS 32	
Level	3	
Credit Value	5	
GLH	24	
Unit Reference No.	D/506/2170	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand how to gather, analyse and interpret customer feedback	1.1 Describe methods of collecting data for customer research 1.2 Explain random sampling techniques used to collect data 1.3 Explain how to evaluate bias in non-random samples 1.4 Explain the principles of questionnaire design 1.5 Assess the suitability of a range of techniques to analyse customer feedback 1.6 Explain techniques used to monitor the quality of data collected 1.7 Explain the use of software to record and analyse customer feedback 1.8 Explain the validation issues associated with customer feedback 1.9 Explain the importance of anonymising comments from customers who do not wish to be identified	
2. Be able to plan the collection of customer feedback on customer service issues	2.1 Identify the objectives of collecting customer feedback 2.2 Justify the reasons for selecting different data collection methods 2.3 Develop a data collection and analysis plan that specifies the sampling frame, data collection and recording methods and timeframe	
3. Be able to gather customer feedback	3.1 Collect customer feedback using the sampling frame identified in a customer service plan 3.2 Record data in a way that makes analysis straightforward 3.3 Verify that all data is handled in line with legal, organisational and ethical policies and procedures	
4. Be able to analyse and interpret customer feedback to recommend improvements	4.1 Use data analysis methods to identify patterns and trends in customer feedback 4.2 Use the findings of a data analysis to identify areas for improvement to customer service 4.3 Present the findings of an analysis in the agreed format 4.4 Recommend improvements in response to the findings of an analysis	

Additional Information about the unit	
Unit expiry date	31 August 2017
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Customers Service (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFACSD12 Gather, analyse and interpret customer feedback
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.2
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared

Title	Employee rights and responsibilities	
Skills CFA Reference	B&A 39	
Level	2	
Credit Value	2	
GLH	16	
Unit Reference No.	L/506/1905	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand the role of organisations and industries	1.1 Explain the role of their own occupation within an organisation and industry 1.2 Describe career pathways within their organisation and industry 1.3 Identify sources of information and advice on an industry, occupation, training and career pathway 1.4 Describe an organisation's principles of conduct and codes of practice 1.5 Explain issues of public concern that affect an organisation and industry 1.6 Describe the types, roles and responsibilities of representative bodies and their relevance to their own role	
2. Understand employers' expectations and employees' rights and obligations	2.1 Describe the employer and employee statutory rights and responsibilities that affect their own role 2.2 Describe an employer's expectations for employees' standards of personal presentation, punctuality and behaviour 2.3 Describe the procedures and documentation that protect relationships with employees 2.4 Identify sources of information and advice on employment rights and responsibilities	

Additional Information about the unit	
Unit expiry date	31 August 2017
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	N/A
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.2
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared

Title	Manage events	
Skills CFA Reference	B&A 69	
Level	4	
Credit Value	6	
GLH	49	
Unit Reference No.	M/506/1959	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand the management of an event	1.1 Explain how organisational objectives will be met by an event 1.2 Explain the flexibilities and constraints of an event's budget 1.3 Evaluate the use of project management techniques in event management 1.4 Analyse how models of contingency and crisis management can be applied to event management 1.5 Analyse the use of customer relationship management (CRM) systems to attract attendees 1.6 Evaluate the application of the principles of logistics to event management 1.7 Describe the insurance requirements of an event	
2. Be able to manage the planning of an event	2.1 Identify the purpose of an event and the key messages to be communicated 2.2 Identify target attendees for an event 2.3 Assess the impact of an event on an organisation and its stakeholders 2.4 Establish requirements for resources, location, technical facilities, layout, health and safety 2.5 Identify how event-related risks and contingencies will be managed 2.6 Develop an event plan that specifies objectives, success and evaluation criteria 2.7 Make formal agreements for what will be provided, by whom and when 2.8 Determine methods of entry, security, access and pricing	
3. Be able to manage an event	3.1 Manage the allocation of resources in accordance with the event management plan 3.2 Respond to changing circumstances in accordance with contingency plans 3.3 Deliver agreed outputs within the timescale 3.4 Manage interdependencies, risks and problems in accordance with the event management plan 3.5 Comply with the venue, insurance and technical requirements 3.6 Apply the principles and good practice of customer care when managing an event 3.7 Adhere to organisational policies and procedures, legal and ethical requirements when managing an event	
4. Be able to follow up an event	4.1 Ensure that all post-event leads or actions are followed up 4.2 Optimise opportunities to take actions that are likely to further business objectives 4.3 Evaluate the effectiveness of an event against agreed criteria	

Additional Information about the unit	
Unit expiry date	31 August 2017
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFABAA312 Organise and co-ordinate event
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.2
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared

Title	Review the quality of customer service	
Skills CFA Reference	CS 36	
Level	4	
Credit Value	4	
GLH	20	
Unit Reference No.	F/506/2176	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Understand how to review the quality of customer service	1.1 Explain the value of measuring the quality of customer service 1.2 Analyse the criteria for and factors involved in setting customer service standards 1.3 Explain how to construct representative samples 1.4 Analyse methods of validating information and information sources 1.5 Explain how to set and use customer service performance metrics 1.6 Explain the use of customer feedback in the measurement of customer service 1.7 Analyse the advantages and disadvantages of a range of data analysis methods	
2. Be able to plan the measurement of customer service	2.1 Identify the features of customer service against which customer satisfaction can be measured 2.2 Select data collection methods that are valid and reliable 2.3 Specify monitoring techniques that measure customer satisfaction 2.4 Establish evaluation objectives and key performance indicators (KPIs) in the measurement of customer service 2.5 Specify the information to be collected	
3. Be able to evaluate the quality of customer service	3.1 Validate the information collected to identify useable data 3.2 Use information analysis methods that are appropriate to the nature of the information collected 3.3 Identify instances of effective customer service, shortfalls and gaps from the information analysis against agreed criteria 3.4 Develop recommendations that address identified areas for improvement supported by evidence	

Additional Information about the unit	
Unit expiry date	31 August 2017
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Customers Service (2013) National Occupational Standards: <ul style="list-style-type: none"> CFACSB14 Review the quality of customer service
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15.2
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared

Title	Health and Safety Procedures in the Workplace	
NOCN Reference	HSPW2	
Level	2	
Credit Value	2	
GLH	16	
Unit Reference No.	T/505/4673	
Learning Outcomes	Assessment Criteria	
The learner will:	The learner can:	
1. Know health and safety procedures in the workplace.	1.1 Define the main responsibilities for health and safety in the workplace of the following: a) employers b) employees. 1.2 Describe two health and safety laws affecting the workplace. 1.3 Define the importance of following health and safety procedures in the workplace. 1.4 Define the types of information or support available in relation to a specified aspect of health and safety in the workplace.	
2. Be able to carry out tasks with regard to health and safety in the workplace.	2.1 Carry out a risk assessment of a specified workplace activity. 2.2 Use equipment or tools safely in the workplace. 2.3 Describe how to prevent accidents in the workplace. 2.4 Assess how own health and safety practices could be improved.	

Additional Information about the unit	
Unit expiry date	31 May 2018
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	N/A
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	N/A
Support for the unit from an SSC or other appropriate body (if required)	NOCN
Location of the unit within the subject/sector classification system	14.2
Name of the organisation submitting the unit	NOCN
Availability for use	Shared



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